



Phase II of the Planning Process

Natural Resources Conservation Service

Conservation Planning Course

Module 7

Phase II of the Planning Process

Objectives

At the end of this module, the participant will be able to:

1. Work with the client to group land units into CMUs.
2. Describe and apply the process of formulating and evaluating alternatives.
3. Complete all RMS processes and worksheets.
4. Work with the client to obtain decisions and develop an implementation schedule.
5. Record and produce plan documents and complete other supporting documentation.
6. Finish, deliver, and review the completed plan.

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Module 7—Phase II of the Planning Process (Classroom and Field)

I. Introduction and Overview

A. Conservation management units.

- Define a CMU.

- Why group land units into CMUs?

- How are land units grouped into CMUs?

Example 1 —

Example 2 —

B. Quality criteria, indicators, and target values.

What are they?

- Quality criteria are _____

- An indicator is _____

- A target value identifies _____

Think of an indicator as the length measured on a yardstick and a target value as a point, 5 inches, to reach on that yardstick.

- Examples of how quality criteria, indicators, and target values are used....

Example 1 -

Example 2 -

- How do indicators and target values relate to quality criteria?

- Additional information on quality criteria, indicators, and target values can be found in the FOTG and the NPPH.

II. Phase II of the Planning Process

A. Phase II of the planning process....

- ---

- ---

B. Phase II consists of three planning steps

5.

6.

7.

- It is critical that a thorough effort of formulating and evaluating alternatives is completed in order to provide the client with a solid set of alternatives to consider.

C. Alternative development

- _____

- _____

- _____

- _____
- _____
- What is a reasonable number of alternatives to develop?
Consider the following:
 - _____
 - _____
 - _____
 - _____
- _____

- _____

- _____

D. Conservation effects and impacts of the alternatives.

- _____

 - _____

 - _____

 - _____

- Effects quantity and quality information is available through....
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____

E. Evaluate the proposed alternatives to determine if they:

- _____
- _____
- _____
- _____

F. How can the alternatives and associated data be displayed in an understandable manner for the client?

- _____
- _____
- _____
- _____
- _____
- _____
- _____

G. How can a conservation effects worksheet be used to help a client make a planning decision?

- For the RMS options developed:

- If the client has selected, or is considering selecting, an option in which quality criteria for one or more resources will not be met, then:

H. Help the client identify and consider potential sources of financial assistance.

- _____

- _____

- _____

I. What do we do when the client is hesitant about addressing regulatory requirements?

- _____

- _____

- _____

- _____

- _____

- _____

J. Depending on the decisions made or not made by the client, any number of actions may be necessary as a result of the planning effort.

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

III. Plan Format and Content

A. Discuss the plan format and content desired in
_____ (state)

-
-

IV. Products of Phase II

What are the key products expected from Phase II of the planning process?

- _____
- _____
- _____
- _____
- _____
- _____
- _____

V. Documentation of Conservation Planning Data

A. What to document in either hardcopy or electronic format:

- _____

- _____

- _____

- _____

- _____

- Conservation contract

- Must have:

- _____

- _____

- _____

- _____

Field Exercise—Classroom Portion

Group activities

Each group should develop a conservation plan for the entire farm / ranch at the RMS level - utilize the RMS process, including development of the SSPEW, RMS Options worksheet, and the Conservation Effects worksheet; develop and evaluate alternatives; present the alternatives to the substitute client (the instructor on the first site the group visited during phase I of the planning process); prepare the plan documents based on the decisions of the substitute client; present the finished plan to the substitute client.

Spend as much of the field exercise time on the farm / ranch as needed - gather additional resource information as needed; meet with the substitute client; measure slopes; conduct preliminary surveys; complete other measurements needed; conduct appropriate evaluations; etc.

The instructors for each site / land use should be available to consult with you and answer questions in the field or the classroom. When a particular group is in the field, the instructor serving as the substitute client for that group should be in the field also.

The group leaders should stay with their group and help guide them, as needed, through Phase II of the planning process, and help facilitate the teaching and learning process.

Plan Presentation

One member of each group should present their plan to their substitute client in the presence of the entire class and the instructors. The class should have an opportunity to ask questions and comment on the presentation and contents of the conservation plan. The real client may be invited to participate in this session.

Field Exercise—Field Portion **Approximately 15 Hours**

Field Activities

- Group fields into CMUs.
- Utilize the RMS process - including the SSPEW, RMS Options worksheet, and the Conservation Effects worksheet.
- Develop alternatives.
- Evaluate alternatives.
- Develop material to present to the substitute client.
- Discuss the alternatives with the substitute client and obtain the substitute client's decisions.
- Complete the plan documents.

Plan Presentation and Discussion

- One member of each group should present the plan to their substitute client, in the presence of the entire class and the instructors.
- Conduct a class discussion on the presentation and content of each plan, after it is presented.

Wrap-Up

- Determine if each group has met the planning standards for Planning Steps 5 - 7.